



## **PEOPLECLICK USER GUIDE**

### **HIRING LEADS**

# PEOPLECLICK USER GUIDE

## HIRING LEADS

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## ACCESSING PEOPLECLICK

The Peopleclick Recruiting Portal is the University of Calgary's recruitment management system. This system enables us to manage our postings, applicants and approval processes. Peopleclick is a web-based application. While you do not need to install any Peopleclick software on your computer to use the Recruiting Portal, you do need to install an approved version of the **Microsoft Internet Explorer** browser (version 7 or 8) and configure it correctly in order to use all of the functions of the Recruiting Portal.

### TIPS FOR USERS OF NON-INTERNET EXPLORER BROWSERS

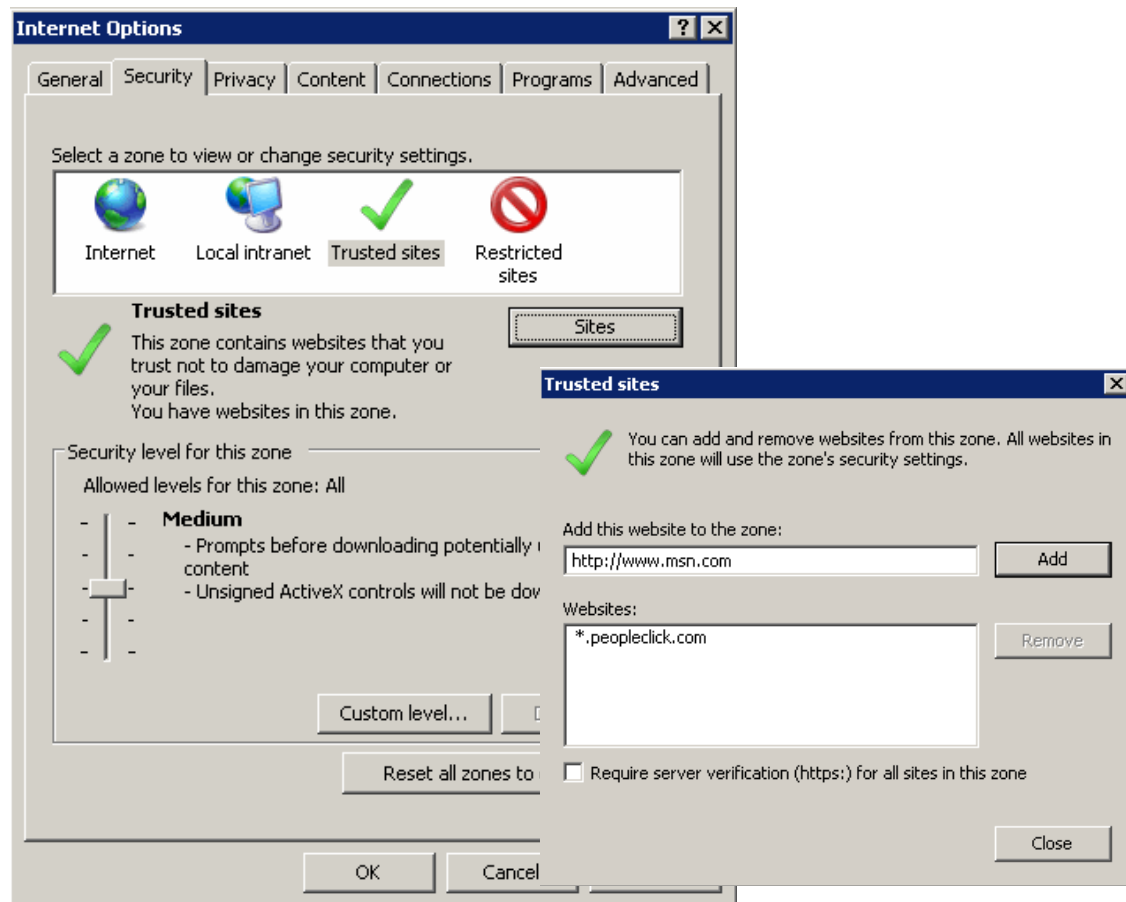
- If you are a PC user and have selected a different browser as your default (e.g., Firefox), you can access Peopleclick by opening Internet Explorer from your desktop and going to <https://home.peopleclick.com>. If Internet Explorer 7 or 8 is not installed on your PC, you can download it from <http://microsoft.com>.
- MAC users have the option of accessing the **U of C Virtual Desktop** which will allow you to use Internet Explorer on your computer. For instructions, please visit the [HR website](#).  
*Note: You must be on campus to access the Virtual Desktop*
- If you are a Linux or Sun Microsystems user, there are alternatives:
  - a. Contact the Recruitment Team ([hrhire@ucalgary.ca](mailto:hrhire@ucalgary.ca)) and request that applications be emailed to you directly
  - b. Contact the Recruitment Team ([hrhire@ucalgary.ca](mailto:hrhire@ucalgary.ca)) and request to have a colleague / administrator added as a hiring manager in Peopleclick so that they can access applications and action candidates on your behalf
  - c. There are often labs and /or PCs available for use by students/staff. Inquire in your department/unit as to where you may be able to access a PC.

## CONFIGURE INTERNET EXPLORER

Once you have successfully downloaded Internet Explorer (if necessary), you must configure certain settings to ensure proper functions are available.

1. Open Internet Explorer
2. On the **Tools** menu, select **Internet Options**

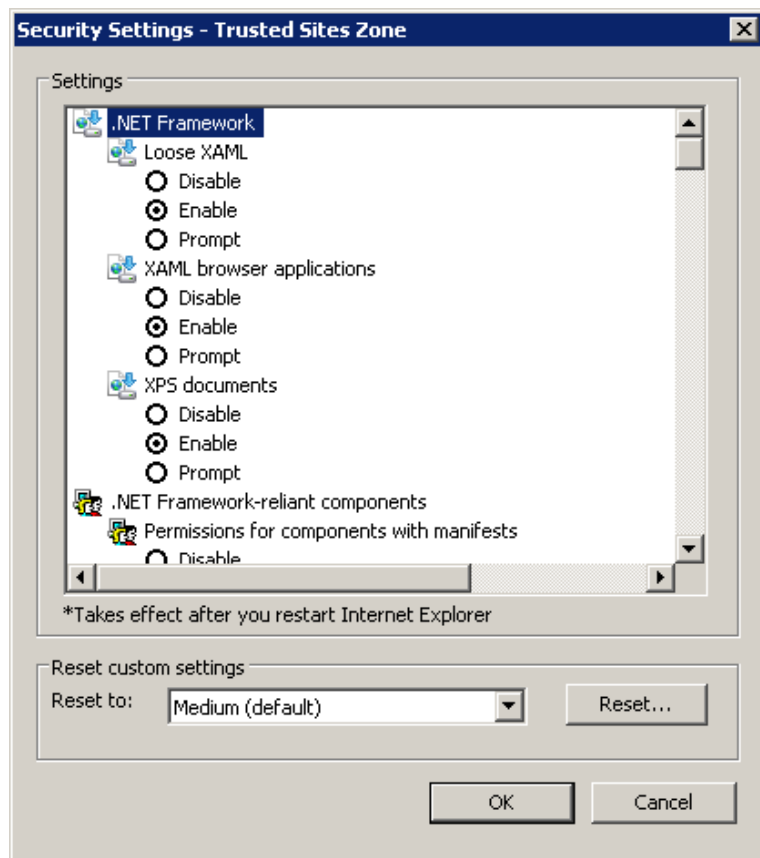
### SET TRUSTED SITES:



3. Click the **Security** tab at the top of the Internet Options dialog box
4. Click the **Trusted Sites** icon
5. Click the **Sites** button
6. Unselect the **Require server verification (https:) for all sites in this zone** check box
7. Type **\*.peopleclick.com** in the **Add this Web site to the zone** field and click the **Add** button
8. Click **Close** to return to the Security tab

## CONFIGURE INTERNET EXPLORER (CONTINUED)

### SET SECURITY SETTINGS:

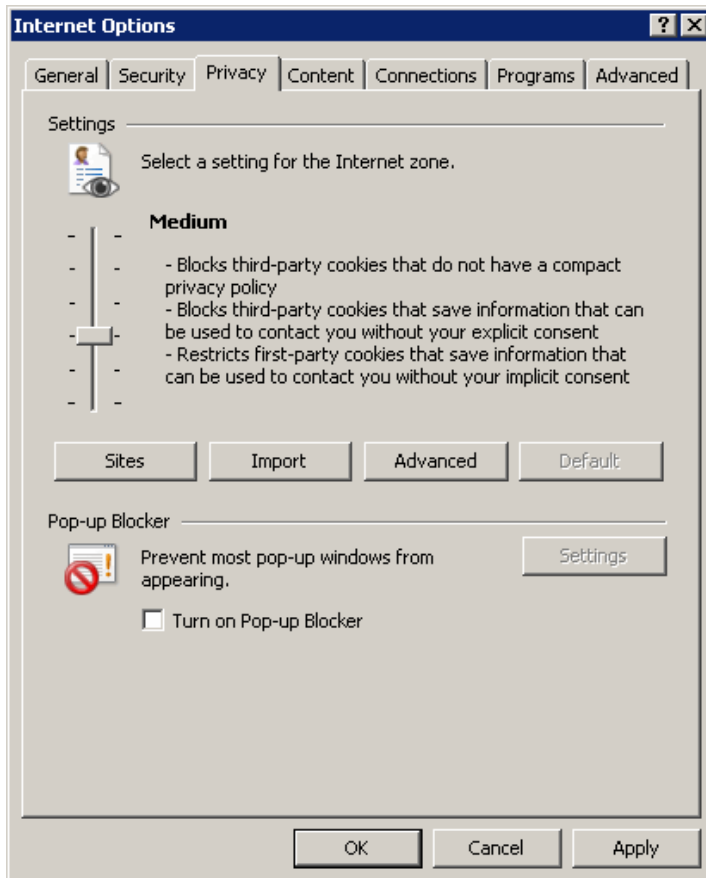


1. On the Security tab, click the **Custom level** button
2. Use the information in the table below to set the Security Settings that impact the Peopleclick RMS Recruiting Portal
3. Click **OK** to apply and save your changes

Setting Name	Required Value
<b>Active X controls and plug-ins</b>	
Run signed ActiveX controls	Enable
Script ActiveX controls marked safe for scripting	Enable
<b>Downloads</b>	
File Download	Enable (Required to view candidate and requisition attachments that are not viewed natively within the browser window.)
<b>Miscellaneous</b>	
Submit non-encrypted form data	Enable. (Required to support the Candidate Portal if not using HTTPS.)
<b>Scripting</b>	
Active Scripting	Enable. (Required to support the Candidate Portal and Business Intelligence Platform.)

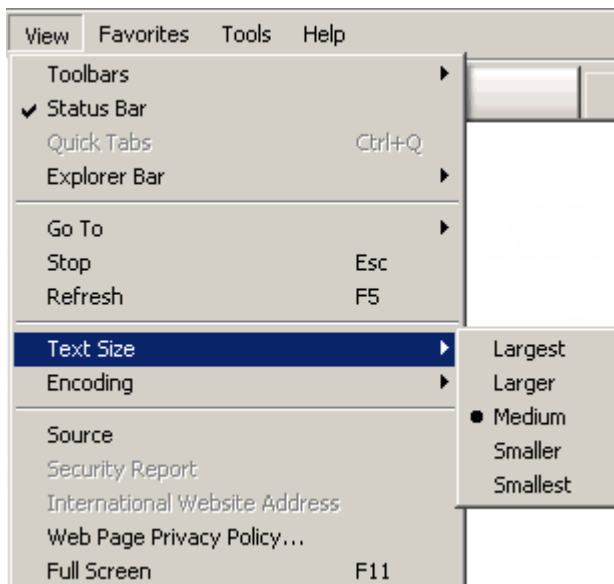
## CONFIGURE INTERNET EXPLORER (CONTINUED)

### SET PRIVACY SETTINGS:



1. Click the **Privacy** tab
2. Use the slider to set the privacy setting to **Medium**
3. Click **OK**.

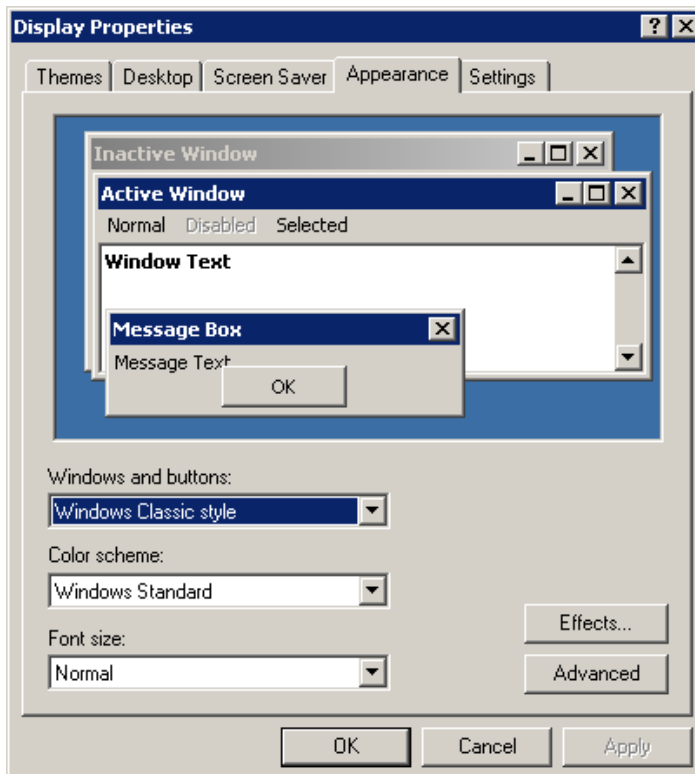
### SET TEXT SIZE:



1. On the **View** menu, click **Text Size**
2. Select **Medium**, **Smaller**, or **Smallest**

## CONFIGURE DESKTOP SETTINGS

The Peopleclick RMS Recruiting Portal is best viewed when specific display settings are selected:



1. Right-click in your Windows Desktop
2. Select **Properties** from the pop-up menu
3. Click the **Appearance** tab
4. Select **Normal** in the **Font size** field
5. Click the **Settings** tab
6. Move the slider to set the display size to 1024 X 768
7. Click the **Advanced** button
8. On the **General** tab, select **Normal (96 DPI)** in the DPI Setting field and then click **OK**
9. Click **OK**.

## BASIC PEOPLECLICK FUNCTIONS

### SIGN IN TO PEOPLECLICK

Peopleclick - Sign In - Windows Internet Explorer

https://home.peopleclick.com/security/login.html

File Edit View Favorites Tools Help

Peopleclick - Sign In

Peopleclick Authoria

**Sign In**

User Name \*

Password \*

Organization Key \*

UNIVCALGARY

[I forgot my password](#)

Powered by  
**Peopleclick  
Authoria**

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[Privacy Policy](#)

VeriSign Secured

TRUSTe

CLICK TO VERIFY

### STEPS

In Internet Explorer (version 7 or 8), enter the URL:

<https://home.peopleclick.com/>

Enter your username, password and organization key (**UNIVCALGARY**).

Your username and password will be provided to you by the Recruitment Team.

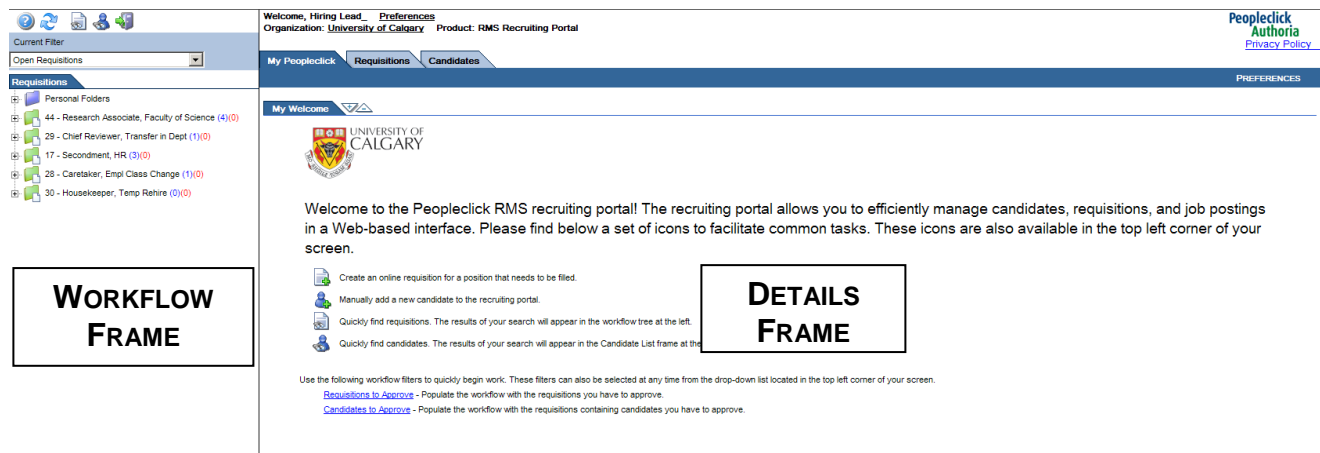
If you are having problems logging in, please contact [hrhire@ucalgary.ca](mailto:hrhire@ucalgary.ca).



# NAVIGATING THE RECRUITING PORTAL

## IDENTIFY SCREEN ELEMENTS IN THE RECRUITING PORTAL

Peopleclick has been designed to make your work easier and more efficient. The Recruiting Portal window is divided into two primary frames: the **Workflow** frame, located on the left, and the **Details** frame, located on the right.



### Workflow Frame

The Workflow frame displays your existing requisitions (job openings) in a folder format. These **requisition** folders contain detailed information about each requisition. Within each requisition folder, a series of **workflow** folders help move candidates through the hiring process.

Candidates appear in the Sent to Manager folder and can be moved through the workflow folders as they are evaluated and a hiring decision is made.

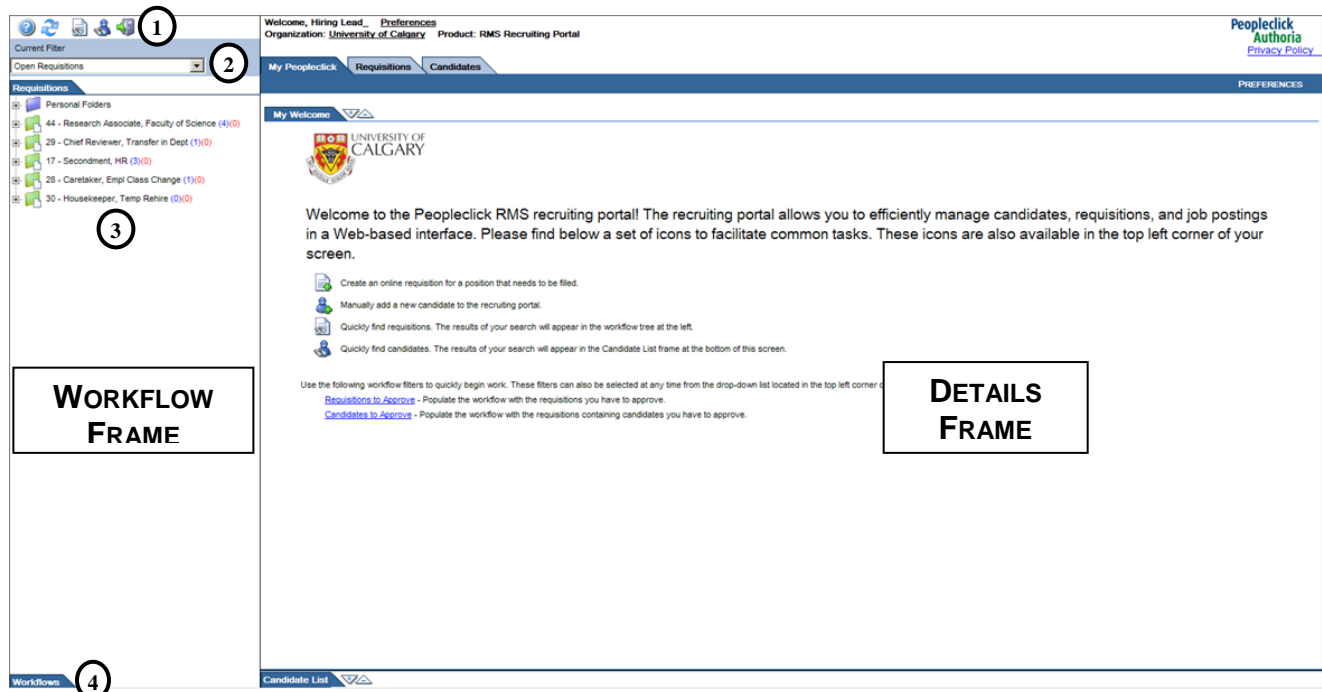
### Details Frame

The Details frame displays the information needed to view and maintain detailed information about requisitions and candidates.

The Details frame displays three main tabs at the top of the frame. Page labels are located directly beneath the main tabs, and information panels are displayed within these pages. Use the tabs, pages, and panels of the Details frame to complete your day-to-day recruiting functions.

## IDENTIFY SCREEN ELEMENTS IN THE RECRUITING PORTAL (CONTINUED)

### Recruiting Portal Screen Elements



**Workflow Frame.** The left side of the window displays requisitions (job openings). Each requisition contains a set of folders that represent the hiring process. Candidates are moved from folder to folder as they move through the hiring process.

- 1 **Global Icons Toolbar.** The Global toolbar is visible regardless of which main tab is selected in the Details Frame.
- 2 **Requisition Filter.** Requisition filters are used to manage the list of requisitions that is displayed in the Workflow frame. For example, you can use filters to display only requisitions that you need to approve (*Requisitions to Approve*), or only those requisitions that fall under a specific status (*Open / Pending / On Hold*).
- 3 **Requisitions View.** The requisitions view displays workflow folders within each requisition. The currently selected requisition filter determines which requisitions are shown. To display the requisitions view, click the **Requisitions** tab in the Workflow frame.
- 4 **Workflows View.** The workflows view displays all the candidates who are in each workflow folder, regardless of the requisition they are assigned to. For example, if you want to review a complete list of candidates you need to interview, click the **Workflows** tab and then click the Interviews folder. The total number of candidates displayed is determined by the currently selected requisition filter and the number of requisitions you have permission to view.

## IDENTIFY SCREEN ELEMENTS IN THE RECRUITING PORTAL (CONTINUED)

### Recruiting Portal Screen Elements (continued)

**Details Frame.** The right side of the window displays the Recruiting Portal three main tabs:

- ① The **My Peopleclick** tab is used to configure the Recruiting Portal so you can easily access the items you need in your daily job duties, such as viewing requisition, candidate, and job posting summaries.
- ② The **Requisitions** tab is used to view information about your current requisitions and add, view, and delete notes and attachments associated with requisitions. Click on a job title in the Workflow frame to view the requisition in the Details Frame.
- ③ The **Candidates** tab is used to view and modify information about current candidates and add notes and attachments to a candidate's profile. Click on the Candidates name to view the Candidate in the Details Frame.

**WORKFLOW FRAME**

**DETAILS FRAME**

## VIEW A REQUISITION

To view a requisition, simply click on the title of the position in the Workflow frame. The details for that requisition will appear on the right hand side of the screen in the Details frame.

**Workflow Frame**

**Details Frame**

**Requisition ID and Title**

**Requisition ID**: 44  
**Title**: Research Associate, Faculty of Science

**Approval Status**

Name	Approved	Create Note	E-Mail Notify	If Denied, Reason	Upon Rejection	Date Sent	Date Completed
Workflow Coord_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:00:47 AM	Wednesday, July 21, 2010 6:10:19 AM
HR Analyst_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:10:19 AM	Wednesday, July 21, 2010 6:10:53 AM
HR Manager_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:10:53 AM	Wednesday, July 21, 2010 6:11:30 AM
Budget Officer_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:11:30 AM	Wednesday, July 21, 2010 6:14:48 AM
Research Accounting_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:14:48 AM	Wednesday, July 21, 2010 6:18:22 AM
Recruiters_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:18:22 AM	Wednesday, July 21, 2010 6:39:30 AM

**General Info**

Job Title	Research Associate, Faculty of Science	Requisition ID	44
Positions to Fill	1	Workflow	Staged Implementation Workflow
Status	Open	Expected End Date (for temporary and fixed term positions)	8/31/2011
Target Start Date	9/1/2010	Created By	HR Manager_ Test
Created On	Monday, July 19, 2010 1:23:51 PM	Modified By	Maria Chirco - REC
Modified On	Tuesday, July 27, 2010 2:56:33 PM		

**Detail Info**

Location	Calgary	Full/Part	Full-Time
Business Unit	UCALG - Trust	Reg/Temp	Temporary
Position Type	Full-time Fixed Term - Grant	Employee Classification	Project - Fixed Term
Experience	Funded	Education	Other
National Occupancy Code (NOC)	Intermediate Level	Relocation	No
Faculty	2221 - Biological Technologists & Techs	Department	12090 - Biological Sciences
Unit	Faculty of Science	Work Hours per week	35.00
Functional Area	Department of Biological Sciences	Background Check Required	No
Job Families	Scientific or Technical		
Department Description	Technical		
Position Requirements	/		
Position Management No. (if applicable)	00098765	Job Profile ID	SC10123
Position Number of Reporting Manager	00012345	Recruiting Start Date	7/19/2010
Recruiting End Date	7/30/2010	Salary Range	Technical Phase 1 (\$3,134.95-\$4,560.62 Monthly)

## Requisition ID and Title

New requisitions display in **bold** for the first 24 hours.

- The **blue** number designates the total number of candidates in the requisition.
- The **red** number designates the number candidates who are new to the requisition within the last 24 hours.

## Requisition Status

Folder colours change when the status of the requisition changes. The status can be changed one of two ways, either automatically by the system or manually by a Recruiter.

## Requisition Status Categories

- |  |                              |                                                      |
|--|------------------------------|------------------------------------------------------|
|  | (green)                      | <b>Open</b>                                          |
|  | (green with blue thumb tack) | <b>Open</b> and posted on the U of C Careers website |
|  | (purple)                     | <b>Pending</b> (awaiting approval)                   |
|  | (yellow)                     | <b>Closed</b>                                        |
|  | (blue)                       | <b>Filled</b>                                        |
|  | (orange)                     | <b>Cancelled</b>                                     |
|  | (red)                        | <b>Denied</b> (rejected / sent back for corrections) |

## VIEW A REQUISITION (CONTINUED)

Requisition information is divided into three separate pages:

- Main Info
- Additional Info
- Documents

Welcome, Hiring Lead Preferences  
Organization: University of Calgary Product: RMS Recruiting Portal

My PeopleClick Requisitions Candidates

Research Associate, Faculty of Science (44)

Approval

Name	Approved	Create Note	E-Mail Notify	If Denied, Reason	Upon Rejection	Date Sent	Date Completed
Workflow Coord_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:00:47 AM	Wednesday, July 21, 2010 6:10:19 AM
HR Analyst_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:10:19 AM	Wednesday, July 21, 2010 6:10:53 AM
HR Manager_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:10:53 AM	Wednesday, July 21, 2010 6:11:30 AM
Budget Officer_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:11:30 AM	Wednesday, July 21, 2010 6:14:48 AM
Research Accounting_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:14:48 AM	Wednesday, July 21, 2010 6:18:22 AM
Recruiters_ Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 6:18:22 AM	Wednesday, July 21, 2010 6:39:30 AM

General Info

Job Title: Research Associate, Faculty of Science  
Positions to Fill: 1  
Status: Open  
Target Start Date: 9/1/2010  
Created On: Monday, July 19, 2010 1:23:51 PM  
Modified On: Tuesday, July 27, 2010 2:56:33 PM

Requisition ID: 44  
Workflow: Staged Implementation Workflow  
Expected End Date (for temporary and fixed term positions): 8/31/2011  
Created By: HR Manager\_ Test  
Modified By: Maria Chirico - REC

Detail Info

Location: Calgary  
Business Unit: UCALT - Trust  
Position Type: Full-time Fixed Term - Grant  
Experience: Intermediate Level  
National Occupancy Code (NOC): 2221 - Biologist Technologists & Techs  
Faculty: Faculty of Science  
Unit: Department of Biological Sciences  
Functional Area: Scientific or Technical  
Job Families: Technical  
Department Description: /  
Position Requirements: /  
Position Management No. (if applicable): 00058765  
Position Number of Reporting Manager: 00012345  
Recruiting End Date: 7/30/2010  
Job Code/Job Family, Phase or Bank: Technical Phase 4 - TEC004

Full/Part: Full-Time  
Reg/Temp: Temporary  
Employee Classification: Project - Fixed Term  
Education: Other  
Relocation: No  
Department: 12090 - Biological Sciences  
Work Hours per week: 35.00  
Background Check Required: No  
Job Profile ID: SCID123  
Recruiting Start Date: 7/19/2010  
Salary Range: Technical Phase 1 (\$3,134.95-\$4,560.62 Monthly)

The **Main Info** page includes the following information:

- **Approval** - Lists the individuals in the approval workflow and shows date/time stamp
- **General Info** - Includes the position title, number of positions and expected start and end dates
- **Detail Info** - Includes all position details including position type, faculty/department, work hours, job code, position description, etc.
- **Contacts** - Lists the contacts connected to the requisitions (i.e. those individuals who have access to view the requisition and the associated candidates)

The **Additional Info** page includes the following:

- **Earnings Distribution** - Breakdown of accounting chartfields the position will be charged to
- **Costs** - Any additional costs associated with the requisition (i.e. advertising costs)

My PeopleClick Requisitions Candidates

Science Demo 2 Test (27)

Earnings Distribution

Funding Source	Percent 1	Fund 1	Department ID 1	Account 1	Program 1	Internal 1	Project 1	Activity 1
Natural Sciences & Engineering (NSERC)	100	60	12150 - Computer Science	53015			RT987654	

Percent 2	Fund 2	Department ID 2	Account 2	Program 2	Internal 2	Project 2	Activity 2

Percent 3	Fund 3	Department ID 3	Account 3	Program 3	Internal 3	Project 3	Activity 3

Percent 4	Fund 4	Department ID 4	Account 4	Program 4	Internal 4	Project 4	Activity 4

Costs

Category	Sub Category	Cost	Expense Date	Note

## VIEW A REQUISITION (CONTINUED)

The **Documents** page includes:

- **Notes** - Any information relevant to the requisition.
- **Attachments** – Any documents connected to this requisition (i.e. Recruitment Request Form)

My Peopleclick

Requisitions

Candidates

Research Associate, Faculty of Science (44 )

MAIN INFO

ADDITIONAL INFO

DOCUMENTS

Notes

	Subject	Date	User
	Recruiters_Test Approved the Requisition	Wednesday, July 21, 2010 6:39:32 AM	Recruiters_Test
	Research Accounting_Test Approved the Requisition	Wednesday, July 21, 2010 6:18:22 AM	Research Accounting_Test
	Budget Officer_Test Approved the Requisition	Wednesday, July 21, 2010 6:14:48 AM	Budget Officer_Test
	HR Manager_Test Approved the Requisition	Wednesday, July 21, 2010 6:11:30 AM	HR Manager_Test
	HR Analyst_Test Approved the Requisition	Wednesday, July 21, 2010 6:10:54 AM	HR Analyst_Test
	Workflow Coord_Test Approved the Requisition	Wednesday, July 21, 2010 6:10:19 AM	Workflow Coord_Test
	Workflow Coord_Test Rejected the Requisition	Tuesday, July 20, 2010 4:09:48 PM	Workflow Coord_Test

Attachments

	Type	Name	Created On	Created By	Modified On	Modified By
	Job Posting Request Form	Recruitment Requestion Form	Monday, July 26, 2010 4:29:40 PM	Maria Chirico - REC	Monday, July 26, 2010 4:29:40 PM	Maria Chirico - REC

To view a note, click on the to the left of the note

To view an attachment, hold down the 'Ctrl' key and click on the next to the document.

### To Add a Note

1. Click the **Add New Note** () icon
2. Enter a subject for the note
3. Click the **Public Note** check box to make the note public (viewable by all RMS users with access to the requisition). If unchecked, it is private and viewable only by you
4. Click **Create**

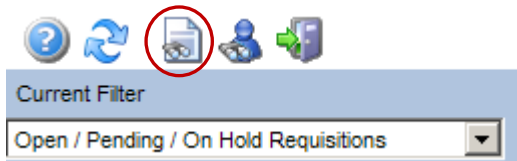
### To Edit a Note You Have Created

1. Click the **Edit** () icon
2. Make changes to the note
3. Click the **Update** button to save changes to the note

### To Add an Attachment

1. Click the **Add/Replace Attachment** () icon
2. Enter a New File Description
3. Choose an Attachment Type
4. Enter the File name or click **Browse** to search for it
5. Click **Upload File**

## SEARCH FOR A REQUISITION



Use **Find Requisition** (  ) icon to search for a specific requisition.

Enter your search criteria and click ' Search' or click 'Cancel' to exit.

[Add People](#)

Recruiter: None selected

Hiring Manager: None selected

Job Title: Research Associate

Requisition ID:

Location:

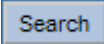
Reset Search


Select from the list of Quick Find results and click OK. Multiple selections are allowed.

- 38 - Research Associate - Pending
- 40 - Research Associate - Pending
- 45 - Research Associate - Pending
- 47 - Research Associate, Faculty of Science - Pending

OK Cancel

A search box will appear and you can search by Job Title, Requisition ID or Recruiter/Hiring Manager.

After entering search criteria, click .

Matches display in the box below. Select one or more requisitions from the list and click  (more than one selection can be made using the 'Ctrl' key).

## SEARCH FOR A REQUISITION (CONTINUED)

Peopleclick RMS - Windows Internet Explorer

https://rmscvv.peopleclick.com/RP/appMain.aspx?Portal=RP%26UserID%3d0

File Edit View Favorites Tools Help

Peopleclick RMS

Welcome, HR Manager\_ Preferences  
Organization: University of Calgary Product: RMS Recruiting Portal

My Peopleclick Requisitions Candidates

Current Filter  
Quick Find

Requisitions

- Personal Folders
- 38 - Research Associate (0)(0)
- 40 - Research Associate (0)(0)
- 45 - Research Associate (0)(0)
- 47 - Research Associate, Faculty of Science (1)(0)

Research Associate, Faculty of Science (47)

Approval

Approval Status	Approval Panels	Approval Editors
Pending	General Info, Detail Info, Earnings Distribution	Research Accounting_Test, Budget Officer_Test, Recruiters_Test, Work

Name	Approved	Create Note	E-Mail Notify	If Denied, Reason	Upon Rejection	Date Sent
Workflow Coord_Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 7:50:53 AM
HR Analyst_Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 8:57:57 AM
HR Manager_Test	Yes	Yes	After Approval		All	Wednesday, July 21, 2010 8:58:22 AM
Budget Officer_Test	No	Yes	After Approval		All	Wednesday, July 21, 2010 1:05:21 PM
Research Accounting_Test	No	Yes	After Approval		All	
VP_Test	No	Yes	After Approval		All	
Recruiters_Test	No	Yes	After Approval		All	

General Info

Job Title	Research Associate, Faculty of Science	Requisition ID	47
Positions to Fill	1	Workflow	Staged Implementation W
Status	Pending		
Target Start Date		Expected End Date (for temporary and fixed term positions)	8/31/2011
Created On	Wednesday, July 21, 2010 7:50:52 AM	Created By	Workflow Coord_Test
Modified On	Wednesday, July 21, 2010 9:39:44 AM	Modified By	HR Manager_Test

Detail Info

Location	Calgary	Full/Part	Full-Time
Business Unit	UCALT - Trust	Reg/Temp	Temporary
Position Type	Full-time Fixed Term - Grant	Employee Classification	Project - Fixed Term
Experience	Funded	Education	Other
National Occupancy Code (NOC)	2221 - Biological Technologists & Techs	Relocation	No
Faculty	Faculty of Science	Department	12090 - Biological Sciences
Unit	Department of Biological Sciences	Work Hours per week	35.00
Functional Area	Scientific or Technical	Background Check Required	No
Job Families	Technical		
Department Description	/		
Position Requirements	/		
Position Management No. (if applicable)		Job Profile ID	SCI0123
Position Number of Reporting Manager		Recruiting Start Date	7/19/2010



Selected requisitions will appear in the Workflow Frame.

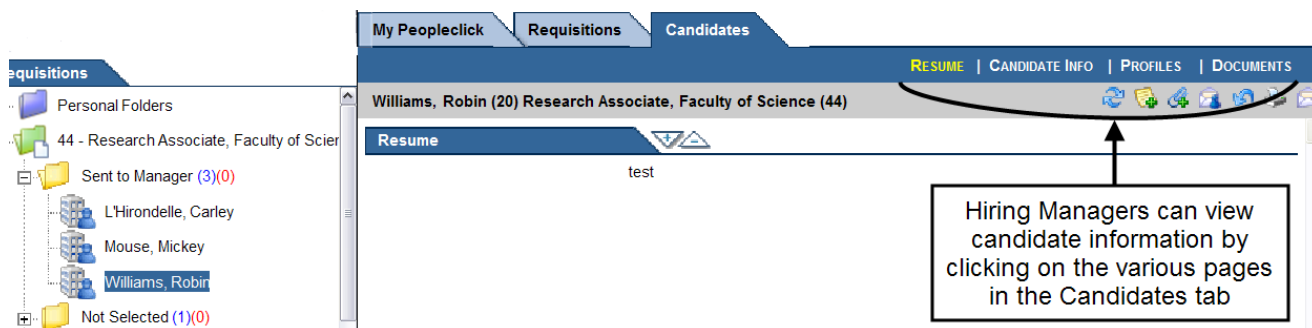


# MANAGING CANDIDATES

## VIEW CANDIDATE INFORMATION

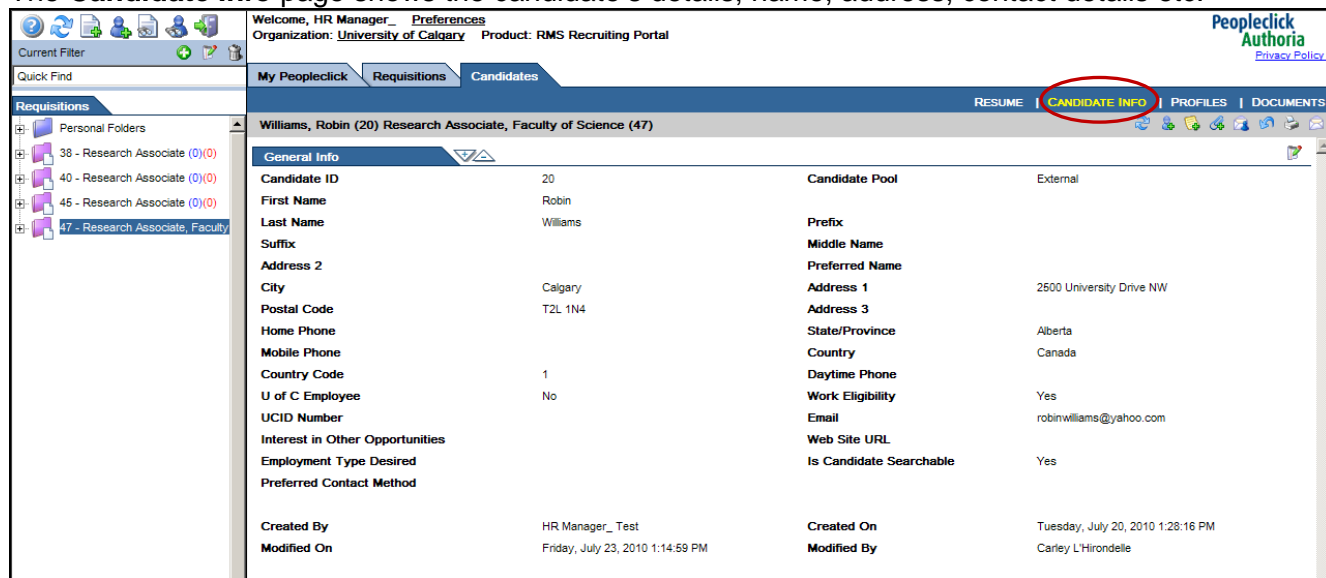
To view the candidates under a requisition, go to the Workflow frame.

1. Click the (+) to the left of the requisition.  The numbers next to the folder name indicate how many candidates are in each folder.
  - The **blue** number designates the total number of candidates in the folder
  - The **red** number designates the number candidates who are new to the folder within the last 24 hours.
2. Click the (+) to the left of the workflow folder 
3. Click the candidate's name to display their information in the details frame.



The **Resume** page shows the candidate's cover letter and resume.

The **Candidate Info** page shows the candidate's details; name, address, contact details etc.




General Info		Candidate Pool	
Candidate ID	20	Candidate Pool	External
First Name	Robin	Prefix	
Last Name	Williams	Middle Name	
Suffix		Preferred Name	
Address 2		Address 1	2500 University Drive NW
City	Calgary	Address 3	
Postal Code	T2L 1N4	State/Province	Alberta
Home Phone		Country	Canada
Mobile Phone		Daytime Phone	
Country Code	1	Work Eligibility	Yes
U of C Employee	No	Email	robinwilliams@yahoo.com
UCID Number		Web Site URL	
Interest in Other Opportunities		Is Candidate Searchable	Yes
Employment Type Desired			
Preferred Contact Method			
Created By	HR Manager_Test	Created On	Tuesday, July 20, 2010 1:28:16 PM
Modified On	Friday, July 23, 2010 1:14:59 PM	Modified By	Carley L'Hirondelle


The **Profiles** page shows the offer information entered via the "Offer Accepted" trigger (see pg. 32), and thus would only show information for the person hired into the position.

## VIEW CANDIDATE INFORMATION (CONTINUED)


The **Documents** page shows any attachment relevant to the candidate.

- **Notes** – can include AUPE service date and interview notes
- **Attachments** – includes documents the candidate submitted, such as reference letters and their resume (if they chose to attach it rather than paste it in).


To view a note, simply click on the  to the left of the note

To view an attachment, hold down the 'Ctrl' key and click on the  next to the document.


### To Add a Note

- Click the **Add New Note** () icon
- Enter a subject for the note
- Click the **Public Note** check box to make the note public (viewable by all RMS users with access to the requisition). If unchecked, it is private and viewable only by you
- Click **Create**

### To Edit a Note You Have Created

- Click the **Edit** () icon
- Make changes to the note
- Click the **Update** button to save changes to the note

### To Add an Attachment







- Click the **Add/Replace Attachment** () icon
- Enter a New File Description
- Choose an Attachment Type
- Enter the File name or click **Browse** to search for it
- Click **Upload File**

## USE CANDIDATE LIST TO MANAGE CANDIDATES


The screenshot shows the 'Requisitions' interface. On the left, under 'Personal Folders', the folder '44 - Research' is expanded, and 'Sent to Manager (4)(0)' is selected, indicated by a red box and the text 'Click Here'. The right pane shows the 'Research Associate, Faculty of Science (44)' requisition. The 'Approval' tab is active, showing a table of approval panels. Below that, the 'General Info' tab is active, and the 'Candidate List' sub-tab is selected, indicated by a red circle. The 'Candidate List' shows 1 to 3 of 3 results, sorted by First Name. The candidates are Carley, Mickey, and Robin. A 'Sort By' dropdown is visible above the list, with arrows pointing to the 'First Name' and 'Last Name' columns.

Name	Approved	Create Note	E-Mail Notify	If Denied, Reason	Upon Rejection
Workflow Coord_ Test	Yes	Yes	After Approval		All
HR Analyst_ Test	Yes	Yes	After Approval		All
HR Manager_ Test	Yes	Yes	After Approval		All
Budget Officer_ Test	Yes	Yes	After Approval		All
Research Accounting_ Test	Yes	Yes	After Approval		All
Recruiters_ Test	Yes	Yes	After Approval		All

	First Name	Last Name
<input checked="" type="checkbox"/>	Carley	L'Hirondelle
<input type="checkbox"/>	Mickey	Mouse
<input type="checkbox"/>	Robin	Williams

1. Click once on the appropriate folder name (i.e. 'Sent to Manager') and the candidates in that folder will appear in your Candidate List.
  2. You can sort the candidate list by first or last name by clicking on the appropriate column.
  3. **To email candidates**, you can either click the check box beside the candidate(s), or click the green check () to select all candidates (click a second time to un-check). Then click the Email Candidates () Icon and an email will pop up with the candidate(s) email address populated.
  4. **To email candidate resume(s)**, select one or more candidates and click the Email Selected Resume/ CVs () icon, and an email will pop up with the resume(s) attached.
  5. **To print candidate resume(s)**, select the candidate(s) you would like, then click the Preview and Print Selected Resume/CVs () icon. A preview screen will pop up with the option to print.
  6. **To move multiple candidates through folders**, select the candidates you would like to move (with individual check boxes or the 'select all' ) , then drag (the candidate icons) and drop into the appropriate folder.
- **At any time you can view all candidates in a requisition by clicking on**  **in the top right corner of the Requisitions tab.**

## SEARCH FOR A CANDIDATE



Current Filter

Open / Pending / On Hold Requisitions

Use the **Candidate Quick Find** (  ) icon to search for a specific candidate.

RMS -- Webpage Dialog

https://rmscvv.peopleclick.com/RP/Searching/QuickFind.aspx

**CANDIDATE QUICK FIND**

Candidate ID	<input type="text"/>
First Name	<input type="text"/>
Middle Name	<input type="text"/>
Last Name	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
Address 3	<input type="text"/>
Social Security Number	<input type="text"/>
Email Address	<input type="text"/>
Alt Email Address	<input type="text"/>
Country	<input type="text"/>
State / Province	<input type="text"/>
City	<input type="text"/>

Find Reset Cancel

https://rmscvv.peopleclick.com/RP/Searchi Internet SSL

A search box will appear giving you several search options. Name and email searches will be the most common (and will give the best results).

After entering search criteria, click .

## SEARCH FOR A CANDIDATE (CONTINUED)

Peopleclick RMS - Windows Internet Explorer

https://rmscvv.peopleclick.com/RP/appMain.aspx?Portal=RP%26UserID%3d0

Welcome, HR Manager\_ Preferences  
Organization: University of Calgary Product: RMS Recruiting Portal

My Peopleclick Requisitions Candidates

Research Associate, Faculty of Science (47)

Approval

Approval Status		Approval Panels		Approval Editors	
Pending		General Info, Detail Info, Earnings Distribution		Research Accounting_Test, Budget Officer_Test, Recruiters_Test, Workflow Coord_Test	

Name	Approved	Create Note	E-Mail Notify	If Denied, Reason	Upon Rejection	Date Sent	Date Completed
Workflow Coord_Test	Yes	Yes	After Approval	All		Wednesday, July 21, 2010 7:50:53 AM	Wednesday, July 21, 2010 8:57:57 AM
HR Analyst_Test	Yes	Yes	After Approval	All		Wednesday, July 21, 2010 8:57:57 AM	Wednesday, July 21, 2010 8:58:22 AM
HR Manager_Test	Yes	Yes	After Approval	All		Wednesday, July 21, 2010 8:58:22 AM	Wednesday, July 21, 2010 9:39:44 AM
Budget Officer_Test	No	Yes	After Approval	All		Wednesday, July 21, 2010 1:05:21 PM	
Research Accounting_Test	No	Yes	After Approval	All			
VP_Test	No	Yes	After Approval	All			
Recruiters_Test	No	Yes	After Approval	All			

General Info

Job Title: Research Associate, Faculty of Science Requisition ID: 47

Positions to Fill: 1 Workflow: Staged Implementation Workflow

Status: Pending

Target Start Date: Expected End Date (for temporary and fixed term positions): 8/31/2011

Created On: Wednesday, July 21, 2010 7:50:52 AM Created By: Workflow Coord\_Test

Modified On: Wednesday, July 21, 2010 9:39:44 AM Modified By: HR Manager\_Test

Detail Info

Location: Calgary Full/Part: Full-Time

Business Unit: UCALT - Trust Reg/Temp: Temporary

Position Type: Full-time Fixed Term - Grant Employee Classification: Project - Fixed Term

Experience: Funded Education: Other

Search Summary

1 to 1 of 1 results

First Name	Last Name
Robin	Williams

1 to 1 of 1 results

Search results will appear under the **Search Summary** tab.

Click on a name and the candidate's information will appear as shown below.

Welcome, HR Manager\_ Preferences  
Organization: University of Calgary Product: RMS Recruiting Portal

My Peopleclick Requisitions Candidates

Williams, Robin (20) Research Associate, Faculty of Science (47)

Resume

test

RESUME | CANDIDATE INFO | PROFILES | DOCUMENTS

You can view candidate information by clicking on the various pages in the Candidates tab. Some candidates choose to attach their cover letter and resume rather than paste it. If they have, their attachments will be under the **Documents** page.

(Note: You are now under the Candidate tab)

Search Summary

1 to 1 of 1 results

First Name	Last Name
Robin	Williams

1 to 1 of 1 results

## PEOPLECLICK WORKFLOW

### MANAGING THE WORKFLOW ~ MOVING CANDIDATES THROUGH THE WORKFLOW

Once all approvals have been obtained and the position has been posted and closed, the following email will be sent to the Hiring Lead and HR Service Team to notify them of the total number of candidates that have applied for the position and highlighting internal candidates with their service date (as per Article 40.05 in the AUPE Collective Agreement).

The screenshot shows a web browser window titled "Webpage Dialog" with the address bar displaying "https://rmscvv.peopleclick.com/RP/Common/Email/PCEmail.aspx". The page has a blue header with a "Send Email" button. Below the header, there are fields for "To...", "CC...", and "BCC...". The "To..." field contains "hiring@ucalgary.ca" and the "CC..." field contains "serviceteam@ucalgary.ca". The "Subject" field contains "Candidate(s) for Requisition: Research Associate, Faculty of Science (#47)". The main body of the email contains the following text:

HiringManager Test,

A total of 6 candidate(s) have been moved to your 'Sent to Manager' folder for requisition #47 (Research Associate, Faculty of Science).

Of those candidates, following is a list of internal employees and their service dates to be considered in accordance with Article 40.05 in the AUPE Collective Agreement.

Robin Williams - 01/02/1993

Please review the candidates as soon as possible. Once you have reviewed the candidates please move them into the appropriate folder(s) as they progress through the competition. Moving candidates through folders allows them to view their application status and also allows recruiters to manage candidates who are being considered for multiple positions.

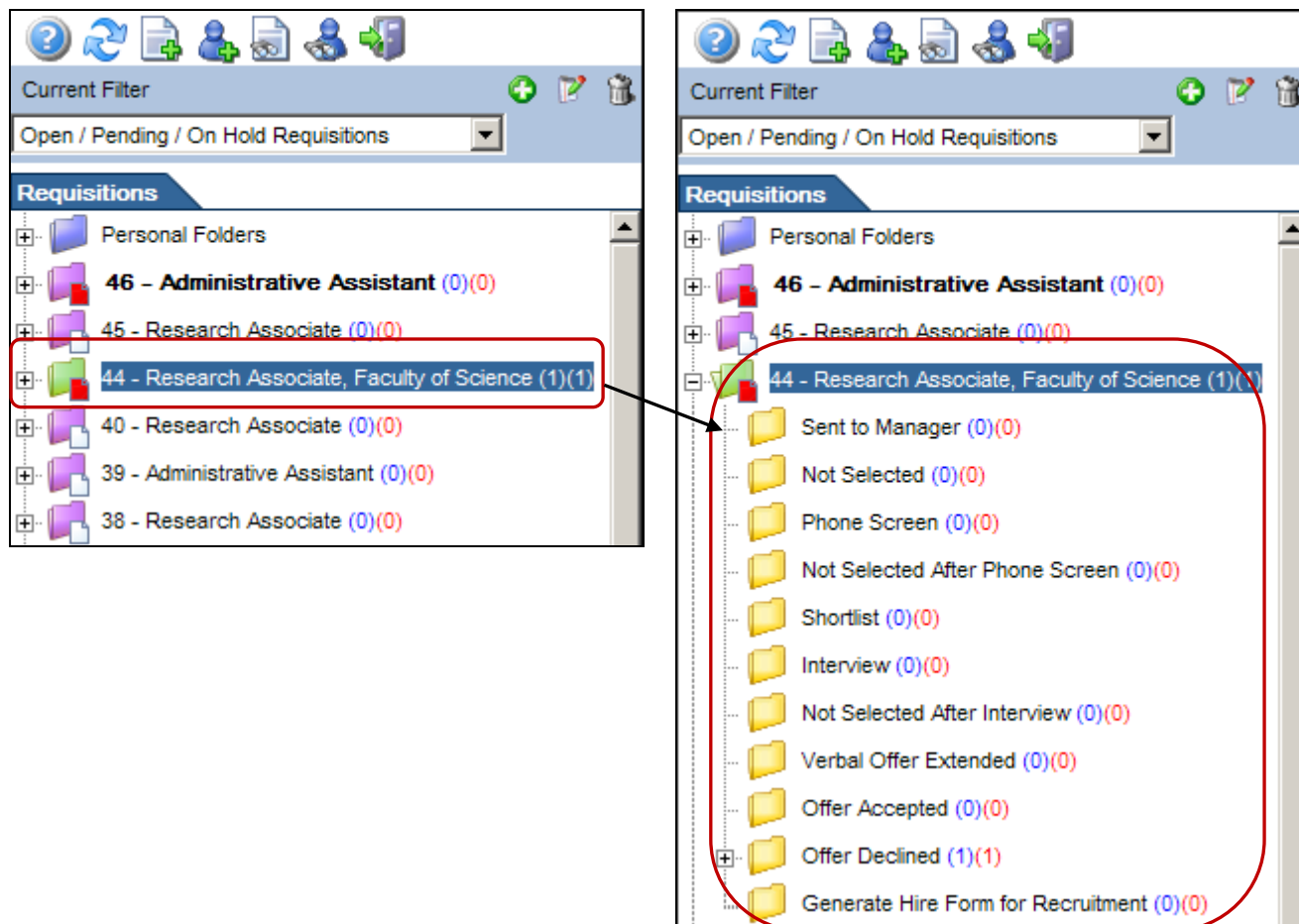
If you have any questions, or would like additional assistance filling this position please contact me.

Thank you,  
Maria Chirico - REC  
maria.chirico@ucalgary.ca

At the bottom of the form, there are "Send" and "Cancel" buttons. The browser's status bar at the bottom shows the URL "https://rmscvv.peopleclick.com/RP/Common/Email/PCEmail.aspx" and indicates an "Internet" connection with "SSL" encryption.

## MANAGING THE WORKFLOW ~ MOVING CANDIDATES THROUGH THE WORKFLOW (CONTINUED)

As candidates progress through the hiring process, you will move them through the corresponding folders in the Workflow frame.

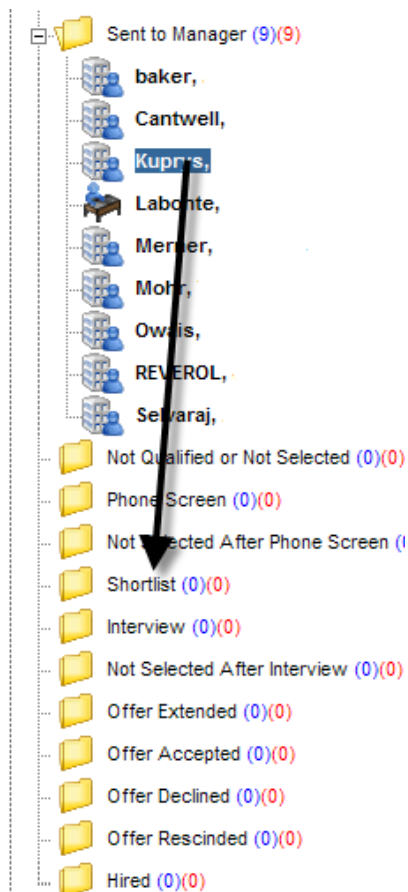


To display the workflow folders within a requisition, click the + sign next to the requisition name. Each workflow folder represents a step in the hiring workflow.

## MANAGING THE WORKFLOW ~ MOVING CANDIDATES THROUGH THE WORKFLOW (CONTINUED)

### How to move candidates within the Workflow folders: Option 1

Step	Description
1	Click on the name of the candidate to view their resume and candidate information
2	Click on the name of the candidate and holding down the left mouse button, drag the candidate down to the folder where you want to move the candidate
3	The candidate's name is displayed under the new folder name





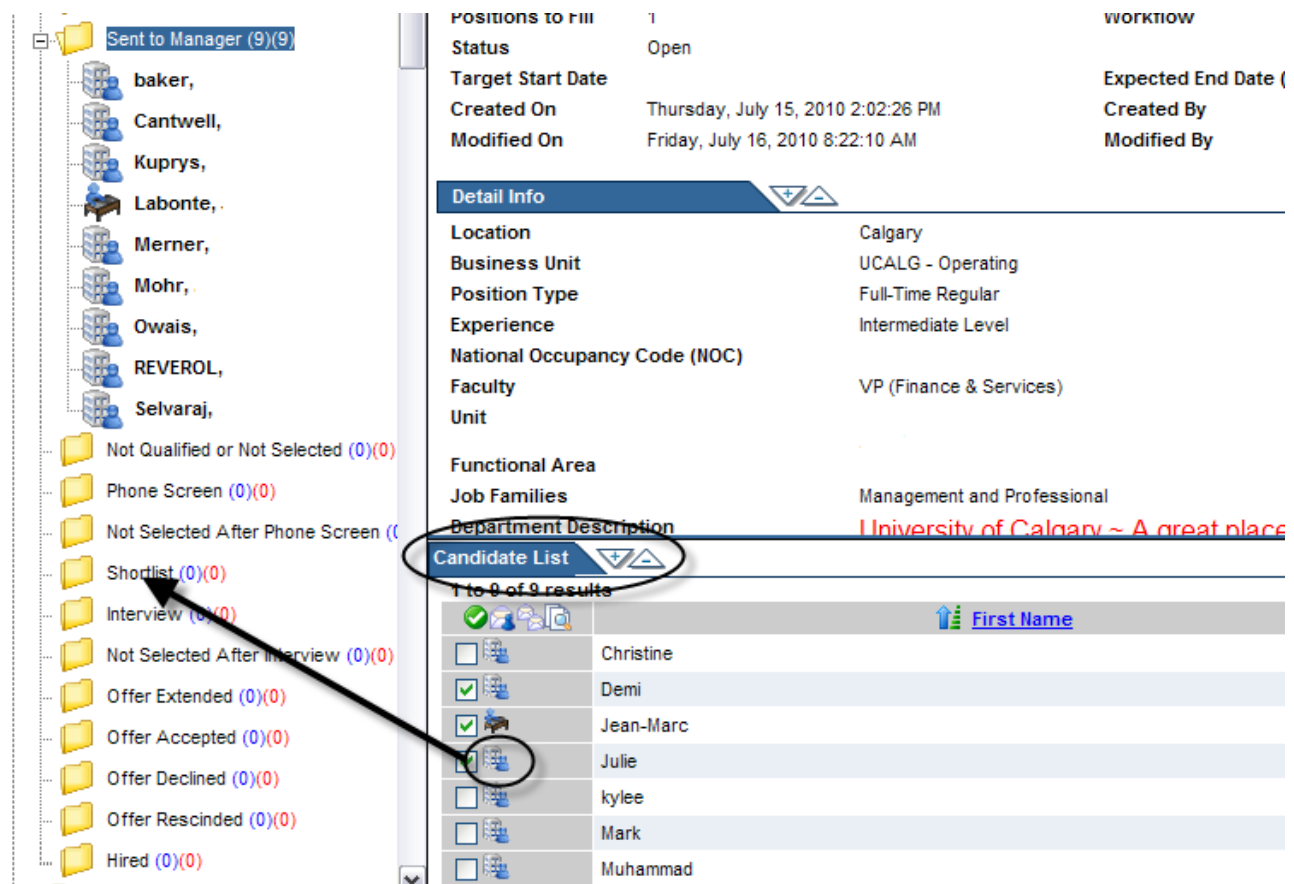


## MANAGING THE WORKFLOW ~ MOVING CANDIDATES THROUGH THE WORKFLOW (CONTINUED)

### How to move candidates within the Workflow folders:

#### Option 2

Step	Description
1	Click the Workflow folder title that you want to move candidates from and display the candidate list
2	In the Candidate List, put a check mark next to the candidate(s) you want to move
3	Click the  or  icon next to the first candidate you selected, and drag the candidates into the desired workflow folder. All selected candidates should move into the desired workflow folder.



**Workflow Folders (Left Panel):**

- Sent to Manager (9)(9)
- baker,
- Cantwell,
- Kuprys,
- Labonte,
- Merner,
- Mohr,
- Owais,
- REVEROL,
- Selvaraj,
- Not Qualified or Not Selected (0)(0)
- Phone Screen (0)(0)
- Not Selected After Phone Screen (0)(0)
- Shortlist (0)(0)
- Interview (0)(0)
- Not Selected After Interview (0)(0)
- Offer Extended (0)(0)
- Offer Accepted (0)(0)
- Offer Declined (0)(0)
- Offer Rescinded (0)(0)
- Hired (0)(0)

**Workflow Details (Right Panel):**

**Positions to Fill:** 1  
**Status:** Open  
**Target Start Date:**  
**Created On:** Thursday, July 15, 2010 2:02:26 PM  
**Modified On:** Friday, July 16, 2010 8:22:10 AM  
**Expected End Date:**  
**Created By:**  
**Modified By:**

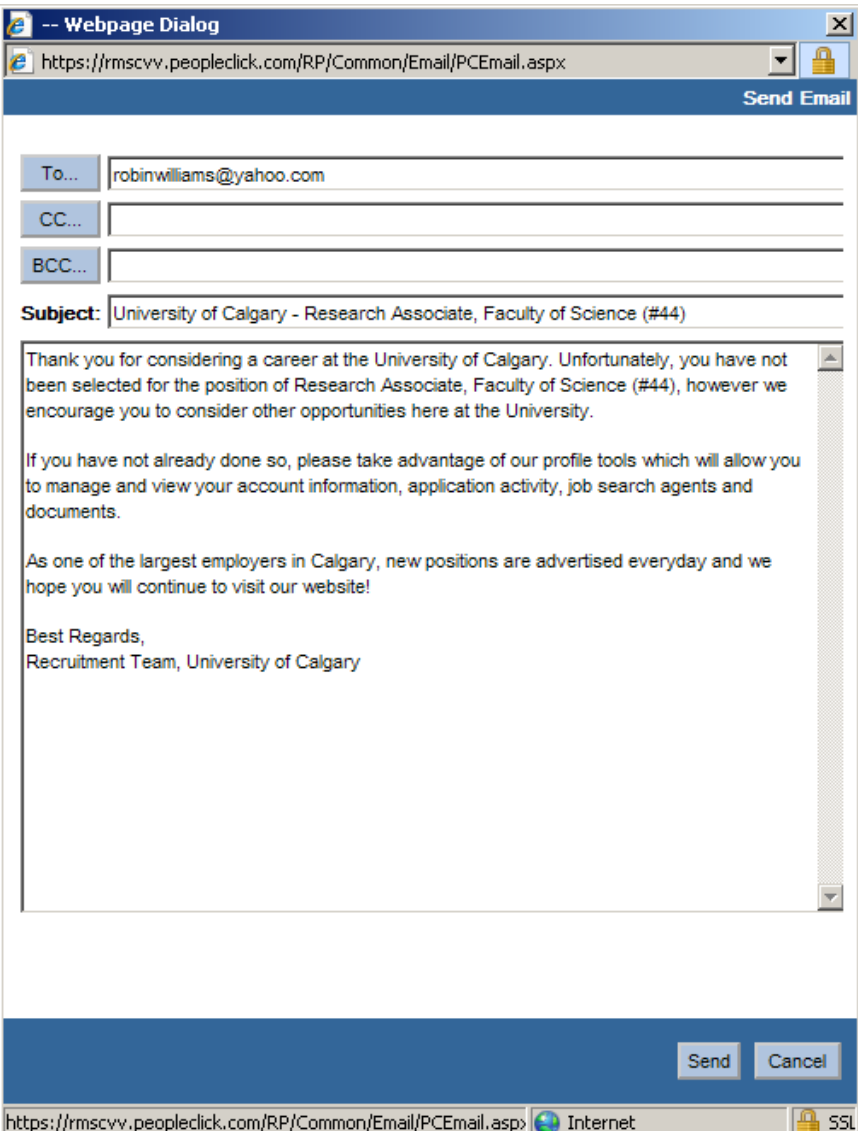
**Detail Info:**

**Location:** Calgary  
**Business Unit:** UCALG - Operating  
**Position Type:** Full-Time Regular  
**Experience:** Intermediate Level  
**National Occupancy Code (NOC):**  
**Faculty:** VP (Finance & Services)  
**Unit:**  
**Functional Area:**  
**Job Families:** Management and Professional  
**Department Description:** University of Calgary ~ A great place

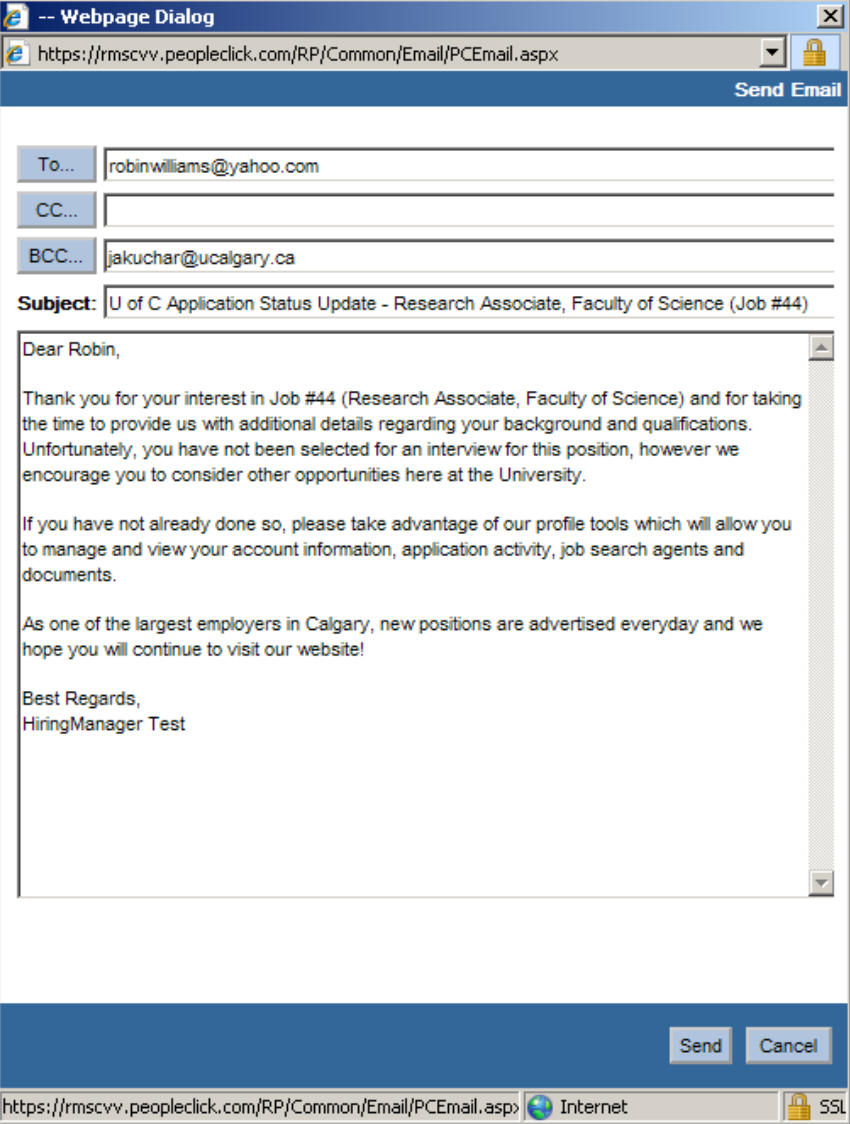
**Candidate List:** 1 to 9 of 9 results

	First Name
<input type="checkbox"/>	Christine
<input checked="" type="checkbox"/>	Demi
<input checked="" type="checkbox"/>	Jean-Marc
<input checked="" type="checkbox"/>	Julie
<input type="checkbox"/>	kylee
<input type="checkbox"/>	Mark
<input type="checkbox"/>	Muhammad

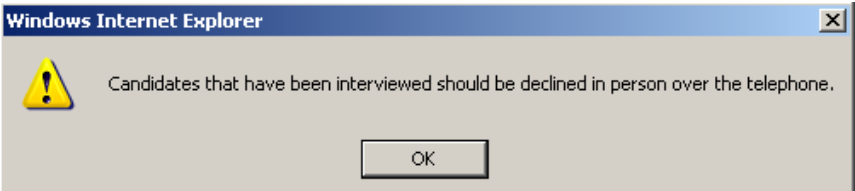
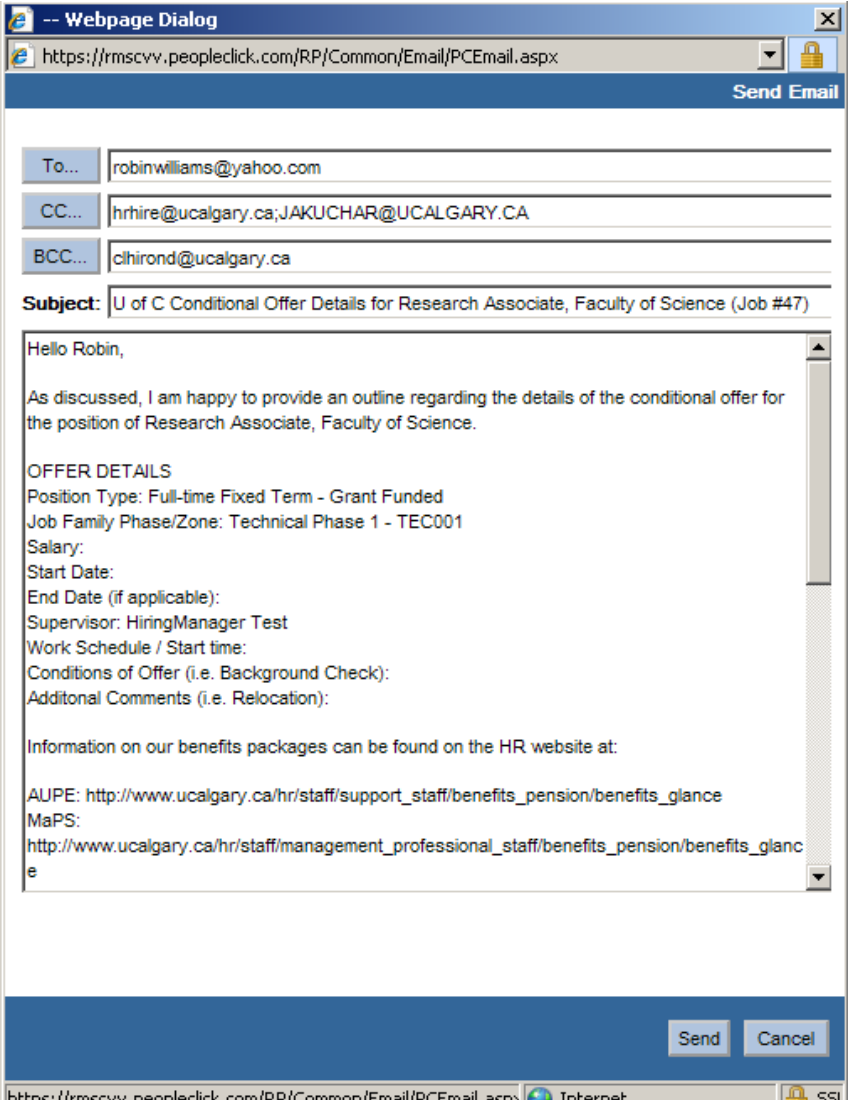
## WORKFLOW FOLDERS AND TRIGGERS

Workflow Folder	Folder Description
<b>Sent to Manager</b>	Candidates who have met minimum requirements and have been sent to the requisition contacts for review
<b>Not Selected</b>	<p>Candidates who have not been shortlisted for the position</p> <p><b>Note:</b> An <b>email trigger</b> will be generated containing a generic and editable decline email to the candidate(s). This email is sent from hrhire@ucalgary.ca</p>  <p>The screenshot shows a 'Webpage Dialog' window with a URL bar containing 'https://rmscvv.peopleclick.com/RP/Common/Email/PCEmail.aspx'. Below the URL bar is a 'Send Email' button. The email form includes fields for 'To...', 'CC...', and 'BCC...', with 'robinwilliams@yahoo.com' entered in the 'To' field. The 'Subject' field is filled with 'University of Calgary - Research Associate, Faculty of Science (#44)'. The email body text reads: 'Thank you for considering a career at the University of Calgary. Unfortunately, you have not been selected for the position of Research Associate, Faculty of Science (#44), however we encourage you to consider other opportunities here at the University. If you have not already done so, please take advantage of our profile tools which will allow you to manage and view your account information, application activity, job search agents and documents. As one of the largest employers in Calgary, new positions are advertised everyday and we hope you will continue to visit our website! Best Regards, Recruitment Team, University of Calgary'. At the bottom of the dialog are 'Send' and 'Cancel' buttons. The status bar at the bottom shows the same URL and 'Internet' and 'SSL' indicators.</p>
<b>Phone Screen</b>	Candidates who have been selected for a phone screen

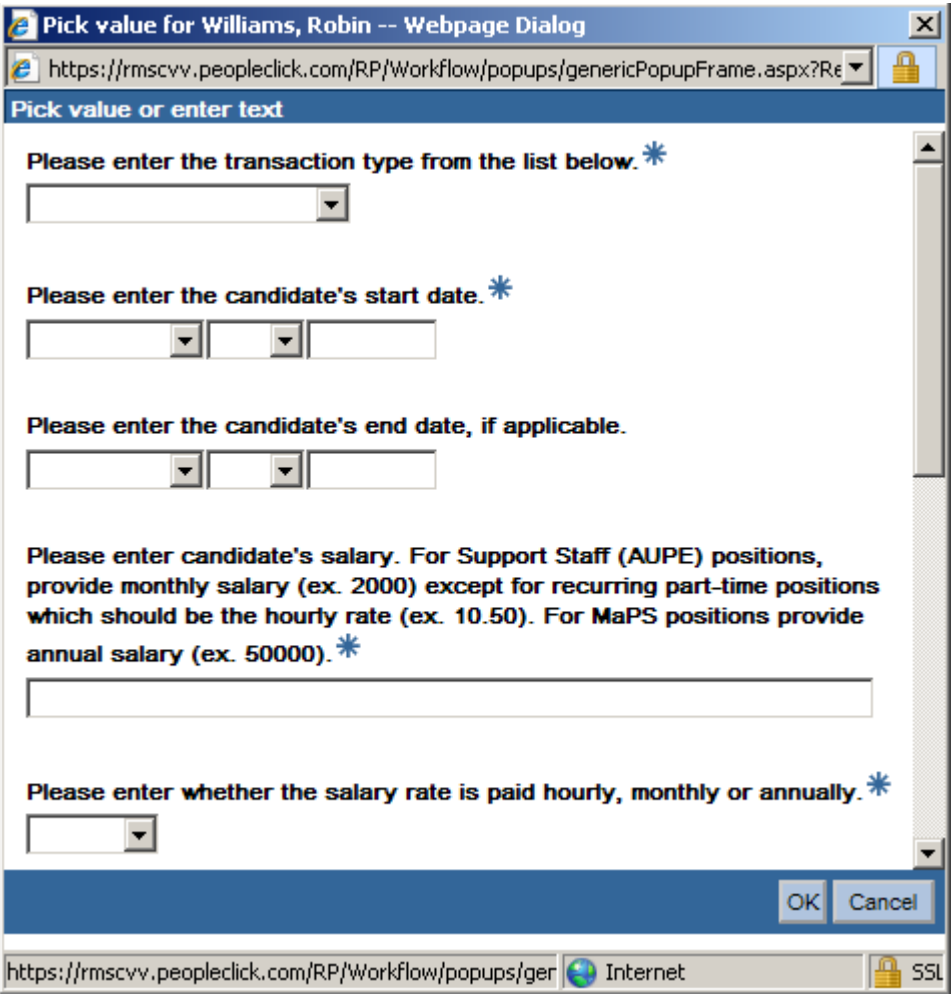
## WORKFLOW FOLDERS AND TRIGGERS (CONTINUED)

<p><b>Not Selected After Phone Screen</b></p>	<p>Candidates who were not selected after phone screen</p> <p><b>Note:</b> An <b>email trigger</b> will be generated containing an editable decline email to the candidate.</p> 
<p><b>Shortlist</b></p>	<p>Candidates who have been shortlisted</p>
<p><b>Interview</b></p>	<p>Candidates who have been selected for an interview</p>

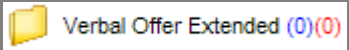
## WORKFLOW FOLDERS AND TRIGGERS (CONTINUED)

<p><b>Not Selected After Interview</b></p>	<p>Candidates who have not been selected after interview</p> <p><b>Note:</b> A <b>message trigger</b> will appear with a reminder that candidates who have been brought in for an interview should be contacted via telephone to decline.</p> 
<p><b>Verbal Offer Extended</b></p>	<p>Successful candidate who has been extended a verbal offer.</p> <p><b>Note:</b> An <b>email trigger</b> will be generated to outline conditional offer details. This should be sent to the candidate and is meant to be a confirmation of the verbal / conditional offer.</p> 

## WORKFLOW FOLDERS AND TRIGGERS (CONTINUED)

<p><b>Offer Accepted</b></p>	<p>Verbal offer accepted</p> <p><b>Note:</b> A <b>trigger</b> will be generated to collect final offer details.</p>  <p>This information can be viewed on the candidate's 'Profile' page</p>
<p><b>Offer Declined</b></p>	<p>Verbal offer declined</p>
<p><b>Generate Hire Form for Recruitment</b></p>	<p>Once offer has been accepted, move candidate to the <b>Generate Hire Form for Recruitment</b> folder.</p> <p><b>Note:</b> A <b>document trigger</b> will generate the <b>Hire Form</b> which will be populated with both job and candidate details.</p>

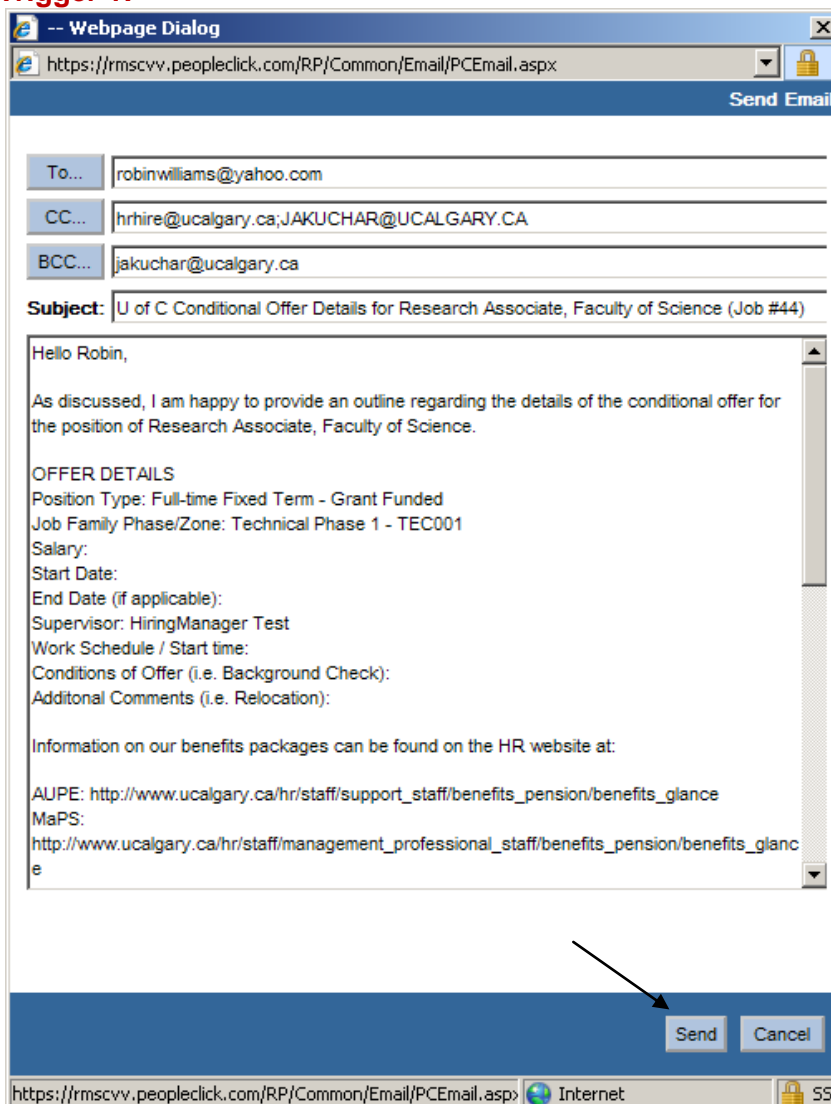
## WORKFLOW STEPS IN THE OFFER PROCESS

1. Once the successful candidate has been determined, the candidate should be extended a verbal offer, and followed up by moving the candidate through the workflow to the **Verbal Offer Extended** folder in the Workflow frame. 

An email trigger will appear (**Trigger 1**) containing offer details. This email should be sent to the successful candidate and copied to the HR Team and Hiring Managers as listed in Peopleclick (requisition contacts should automatically populate).

Most information will automatically populate, however **Salary, Start Date, End Date (if applicable), Work Schedule / Start time, Conditions of Offer (if applicable)** and any **Additional Comments** will need to be entered.

### Trigger 1:



The screenshot shows a web browser window titled "Webpage Dialog" with the URL <https://rmscvv.peopleclick.com/RP/Common/Email/PEmail.aspx>. The page has a "Send Email" header. The email form contains the following fields:

- To...**: robinwilliams@yahoo.com
- CC...**: hrhire@ucalgary.ca, JAKUCHAR@UCALGARY.CA
- BCC...**: jakuchar@ucalgary.ca
- Subject:** U of C Conditional Offer Details for Research Associate, Faculty of Science (Job #44)

The email body text is as follows:

Hello Robin,

As discussed, I am happy to provide an outline regarding the details of the conditional offer for the position of Research Associate, Faculty of Science.


**OFFER DETAILS**

Position Type: Full-time Fixed Term - Grant Funded  
Job Family Phase/Zone: Technical Phase 1 - TEC001  
Salary:  
Start Date:  
End Date (if applicable):  
Supervisor: HiringManager Test  
Work Schedule / Start time:  
Conditions of Offer (i.e. Background Check):  
Additional Comments (i.e. Relocation):

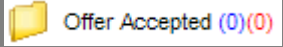
Information on our benefits packages can be found on the HR website at:

AUPE: [http://www.ucalgary.ca/hr/staff/support\\_staff/benefits\\_pension/benefits\\_glance](http://www.ucalgary.ca/hr/staff/support_staff/benefits_pension/benefits_glance)  
MaPS: [http://www.ucalgary.ca/hr/staff/management\\_professional\\_staff/benefits\\_pension/benefits\\_glance](http://www.ucalgary.ca/hr/staff/management_professional_staff/benefits_pension/benefits_glance)

The "Send" button is highlighted with an arrow.

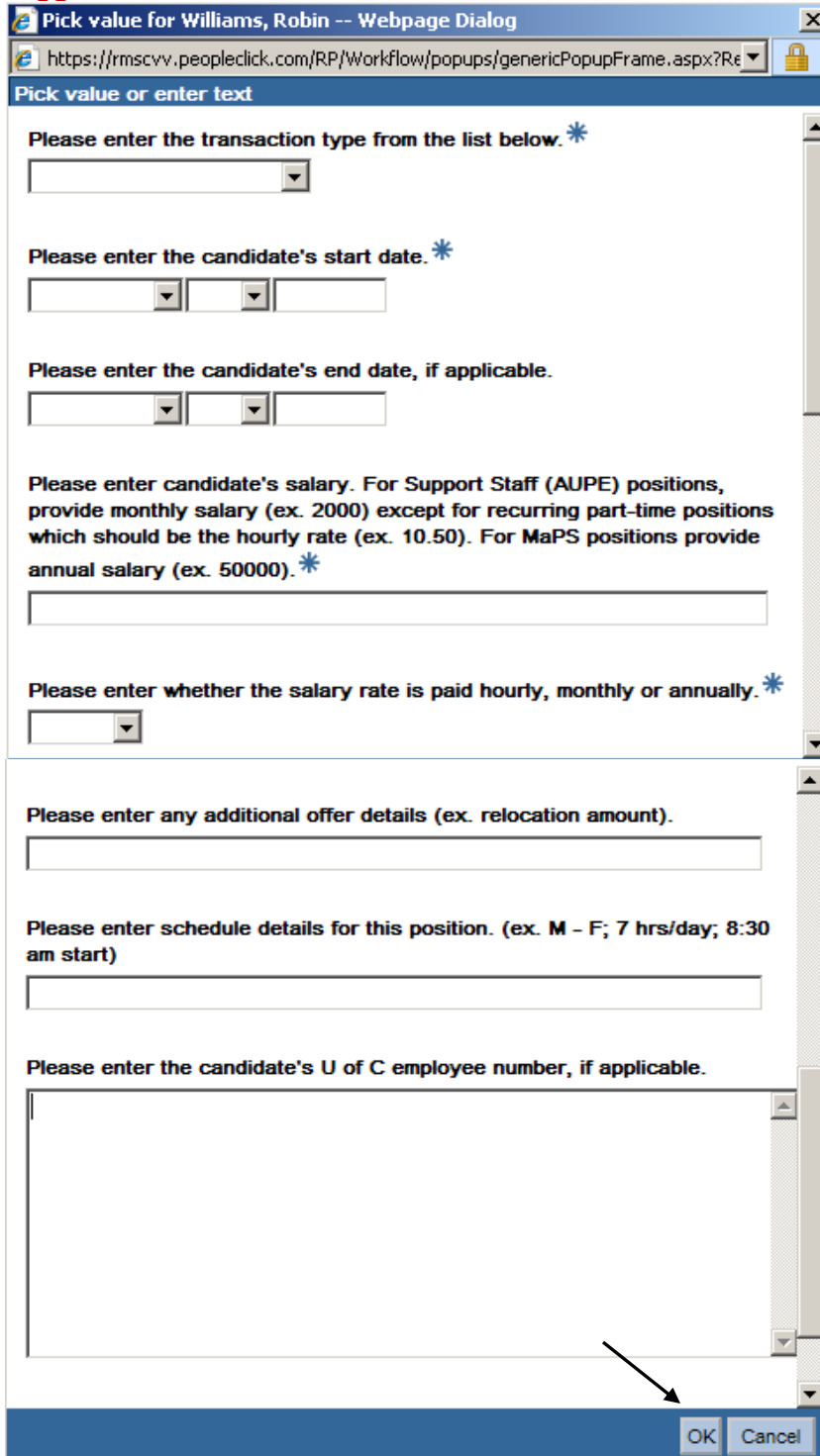
Once offer details are complete, click .

## WORKFLOW STEPS IN THE OFFER PROCESS (CONTINUED)

2. Once the successful candidate has agreed to the terms of the verbal offer by verbally accepting or by replying to the 'Conditional Offer Details' email, the candidate should be moved to the **Offer Accepted** folder in the Workflow frame. 

The following trigger will appear to collect final offer details (**Trigger 2**).

### Trigger 2



Pick value for Williams, Robin -- Webpage Dialog

https://rmscvv.peopleclick.com/RP/Workflow/popups/genericPopupFrame.aspx?Re

Pick value or enter text

Please enter the transaction type from the list below. \*

Please enter the candidate's start date. \*

Please enter the candidate's end date, if applicable.

Please enter candidate's salary. For Support Staff (AUPE) positions, provide monthly salary (ex. 2000) except for recurring part-time positions which should be the hourly rate (ex. 10.50). For MaPS positions provide annual salary (ex. 50000). \*

Please enter whether the salary rate is paid hourly, monthly or annually. \*

Please enter any additional offer details (ex. relocation amount).

Please enter schedule details for this position. (ex. M - F; 7 hrs/day; 8:30 am start)


Please enter the candidate's U of C employee number, if applicable.

OK Cancel

## WORKFLOW STEPS IN THE OFFER PROCESS (CONTINUED)

3. Enter the following candidate offer details into the **Offer Accepted** trigger:

Trigger Field	Description
<b>Transaction Type</b>	Please enter the transaction type from the drop down list.
<b>Candidate's Start Date</b>	Please enter the candidate's start date (e.g. their first actual day on the job).
<b>Candidate's End Date</b>	Please enter the candidate's end date, if applicable (ie. Temporary, Limited Term and Fixed Term positions)
<b>Candidate's Salary (do not include \$)</b>	Please enter candidate's salary. For Support Staff (AUPE) positions, provide the monthly salary (ex. 2000) except for recurring part-time positions which should be the hourly rate (ex. 10.50). For MaPS positions provide the annual salary (ex. 50000).
<b>Salary Schedule</b>	Please enter whether the salary rate is paid hourly, monthly or annually.
<b>Additional Offer Details</b>	Please enter any additional offer details (ex. Relocation amount), notes for offer letter, etc.
<b>Schedule Details</b>	Please enter schedule details for this position. (ex. M – F; 7 hrs/day; 8:30 am start)  <b>Note:</b> Recurring Part Time positions do not require a schedule
<b>UCID</b>	Please enter the candidate's UCID (employee id #) if applicable.
<b>Employee Record</b>	Please enter the employee record number to which this position applies, if applicable.

Once offer details are complete, click .

These details can be viewed on the Candidate's 'Profile' page



## WORKFLOW STEPS IN THE OFFER PROCESS (CONTINUED)

An email trigger will appear **(Trigger 3)** containing offer details. This email is meant to be sent by the Hiring Lead to the primary recruiter (HR Service Team member) to confirm that the candidate has accepted the offer and inform them the candidate is ready for processing (requisition contacts should automatically populate).

### Trigger 3

-- Webpage Dialog

https://rmscvv.peopleclick.com/RP/Common/Email/PCEmail.aspx

Send Email

To... jakuchar@ucalgary.ca

CC... hrhire@ucalgary.ca

BCC...

Subject: Conditional Offer Accepted for Job #47 (Research Associate, Faculty of Science)

Dear HR Manager\_,

We have offered the position of Research Associate, Faculty of Science to Robin Williams, and they have accepted.

Final offer details have been entered into Peopleclick, and Robin has been given instructions to contact you to provide personal details including birth date, SIN, marital status, etc.

Should you require any additional information to process the hire, please feel free to contact me.

Regards,

HiringManager Test

Send Cancel

https://rmscvv.peopleclick.com/RP/Common/Email/PCEmail.aspx Internet SSL

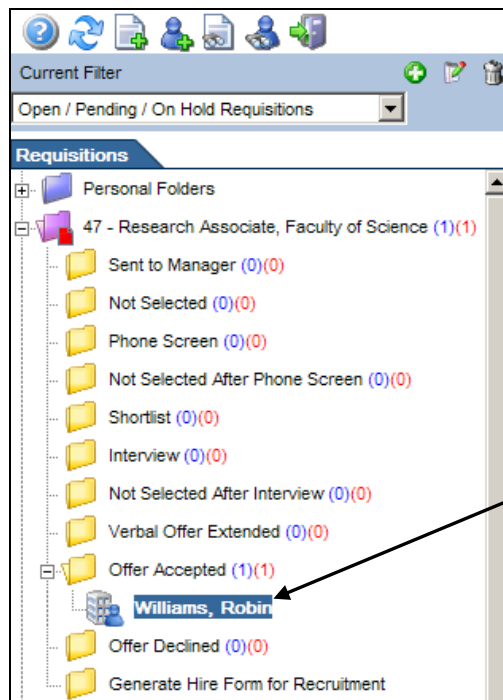
## WORKFLOW STEPS IN THE OFFER PROCESS (CONTINUED)

### How to Edit Offer Information:

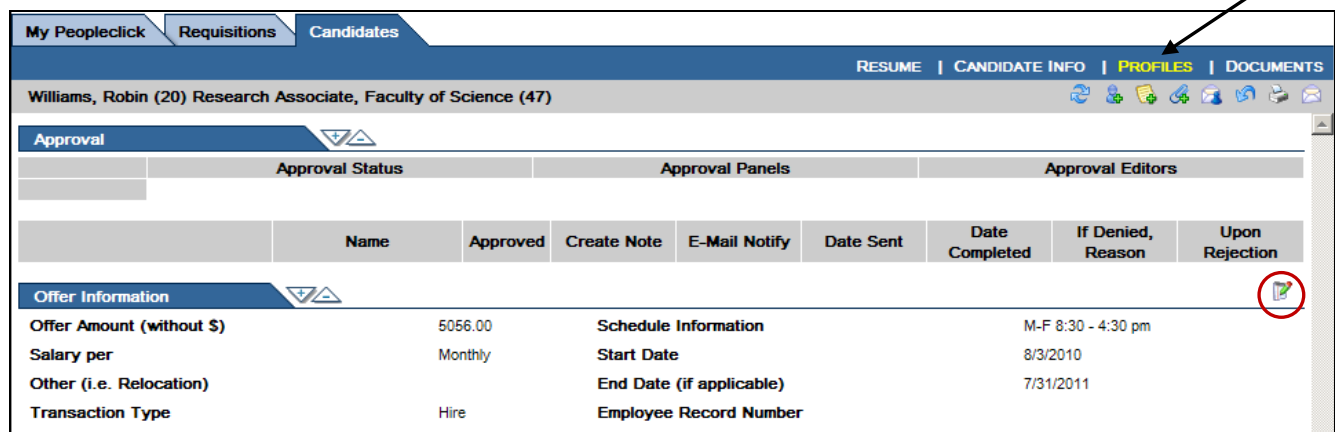
If you need to make any changes to the Offer Accepted information or Candidate Information after clicking OK on the Offer Accepted trigger, please navigate to the following pages in Peopleclick.

#### Changes to Offer Information:

- a) In the Workflow frame, under the **Offer Accepted** folder, click on the successful candidate's name.



- b) In the Detail frame, click on the **Profiles** link to display **Offer Information**



- c) To make changes to the **Offer Information**, click the edit (✎) icon

d) Edit the applicable offer details and click **Save**.

RMS -- Webpage Dialog  
https://rmscvv.peopleclick.com/RP/Candidates/edit/candEditFrame.aspx?candId=20&candProfileId=60&PanelId=13&DataArea=CP\_CORE

**Edit Candidate**

**Offer Information**

Offer Amount (without \$) 5056.00

Salary per Monthly

Other (i.e. Relocation)

Schedule Information M-F 8:30 - 4:30 pm

Start Date Aug 03 2010

End Date (if applicable) Jul 31 2011

Transaction Type Hire

Employee Record Number

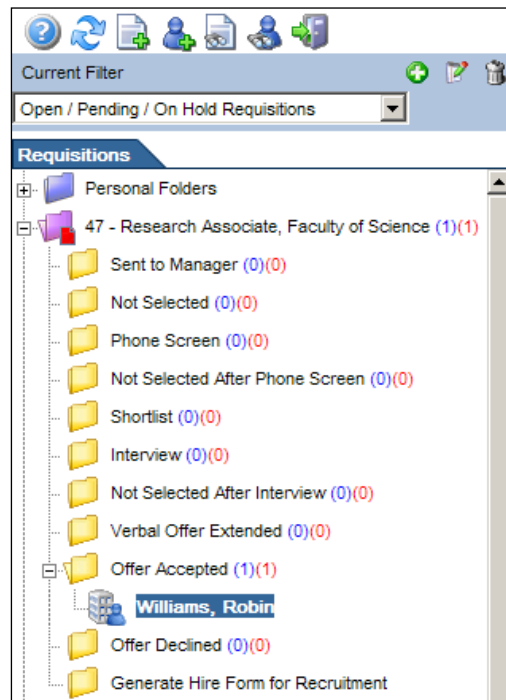
Save Cancel

https://rmscvv.peopleclick.com/RP/Candidates/edit/candEditFrame.aspx?candId=20&candProfileId=60&PanelId=1; Internet SSL

## WORKFLOW STEPS IN THE OFFER PROCESS (CONTINUED)

### Changes to Candidate Information:

- a) In the Workflow frame, under the **Offer Accepted** folder, click on the successful candidate's name



- b) In the Detail frame, click on the **Candidate Info** link to display general candidate info

Under the **Candidate Info** section you may edit any of the following which will automatically populate into the Hire Form:

- First Name
- Last Name
- Address Information
- Contact Information
- Email
- UCID #

- c) To make changes to the Candidate Info, click the edit (✎) icon.

- d) Edit the applicable Candidate Info and click

Save

My Peopleclick   Requisitions   Candidates			
RESUME   <b>CANDIDATE INFO</b>   PROFILES   DOCUMENTS			
Williams, Robin (20) Research Associate, Faculty of Science (47)			
<b>General Info</b>			
Candidate ID	20	Candidate Pool	External
First Name	Robin	Prefix	
Last Name	Williams	Middle Name	
Suffix		Preferred Name	
Address 2		Address 1	2500 University Drive NW
City	Calgary	Address 3	
Postal Code	T2L 1N4	State/Province	Alberta
Home Phone		Country	Canada
Mobile Phone		Daytime Phone	
Country Code	1	Work Eligibility	Yes
U of C Employee	No	Email	robinwilliams@yahoo.com
UCID Number		Web Site URL	
Interest in Other Opportunities		Is Candidate Searchable	Yes
Employment Type Desired			
Preferred Contact Method			
Created By	HR Manager_ Test	Created On	Tuesday, July 20, 2010 1:28:16 PM
Modified On	Friday, July 23, 2010 1:14:59 PM	Modified By	Carley L'Hirondelle

### IMPORTANT NOTE:

You must notify your HR Service Team if any change is made to a candidate's offer information details, as a revised Hire form must be sent to [hrrhire@ucalgary.ca](mailto:hrrhire@ucalgary.ca).

## ICON GLOSSARY

### Global Toolbar Icons

These icons appear in the top left corner of the screen



View the Recruiting Portal online help



Refresh the display of Requisitions and Candidates in the Workflow Tree



Requisition Quick Find



Candidate Quick Find



Log out of the Recruiting Portal

### Requisition Icons

These icons appear next to the requisition in the Workflow Tree



(green)

Open Requisition



(green with blue thumb tack)

Open Requisition that is posted on the U of C Careers website



(purple)

Requisition pending approval



(yellow)

Closed Requisition



(blue)

Requisition that has been filled



(orange)

Requisition that has been cancelled



(red)

Requisition that has been rejected or sent back for corrections

### Requisition Toolbar Icons

These icons appear in the top right corner of the Requisition tab



Refresh the information shown for the current requisition



Display all the candidates in the requisition in the Candidate List frame



Add a note to the current requisition



Attach a document to the current requisition



Print the current requisition

### Right-Click Requisition Icons

These icons appear when you right click a requisition in the Workflow Tree



Display the number of candidates in each workflow folder



Display all the candidates in the requisitions in the Candidate List



Quickly find a requisition



Collapse the Workflow Tree

## ICON GLOSSARY (CONTINUED)

### Right-Click Workflow Folder Icons

These icons appear when you right click a Workflow folder in the Workflow Tree



Quickly find a requisition



Collapse the Workflow Tree

### Candidate Indicators

These are the icons that appear next to a candidate's name in the Workflow Tree and the Candidate List



External Candidate



Internal Candidate



Referred Candidate

### Candidate Toolbar Icons

These icons appear in the top right corner of the Candidates tab



Refresh the information shown for the current candidate



Add a note to the current candidate



Attach a document to the current candidate



Send an email message to the current candidate



Undo the last candidate move



Print the current candidate's information



Forward the current candidate's resume

### Right-Click Candidate Icons

These icons appear when you right click a candidate in the Workflow Tree



Collapse the Workflow Tree



Send an email message to the current candidate



Undo the last candidate move